

Managing the Intra-Agency Transfer Process Overview

The Transfer Employee business process refers to the movement of an employee from one position to another position. This Job Aid addresses how to transfer an employee from one position to another position within the same agency, otherwise known as an Intra-Agency Transfer.

The transfer of an employee represents several possible job changes such as a Promotion, Demotion, Voluntary Transfer, or a Reassignment. The corresponding Action/Action Reasons are used to capture the appropriate transaction.

This document has two sections.

1. The process to transfer an employee from a salaried position to a salaried position or a waged position to a wage position within the same agency;
2. The process to transfer an employee from a salaried position to wage position or a waged position to a salaried position within the same agency.

This document covers the process used to extract the transfer transaction once the job data is saved on the employee's job record.

The Cardinal HR module does not include management approval workflow, therefore all approvals shall take place outside of the system in accordance with applicable policy prior to processing transactions.

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Transfer Employee from a Wage Position to a Wage Position or Salary Position to Salary Position

Before beginning, ensure that all necessary data is accessible and ready for data entry.

1. **Navigate** to the **Job Data** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID

begins with ▼

Empl Record

= ▼

Name

begins with ▼

Last Name

begins with ▼

Second Last Name

begins with ▼

Alternate Character Name

begins with ▼

Middle Name

begins with ▼

☐ Include History

☐ Correct History

☐ Case Sensitive


Limit the number of results to (up to 300):

300

Search

Clear

Basic Search

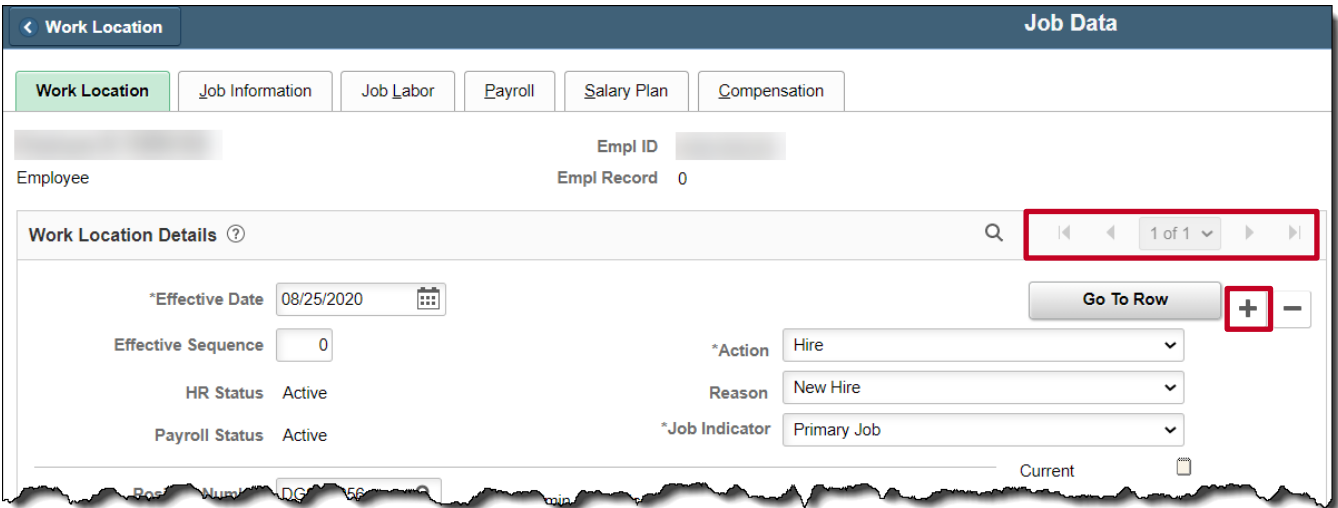
 Save Search Criteria

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

- Click the **Search** button.

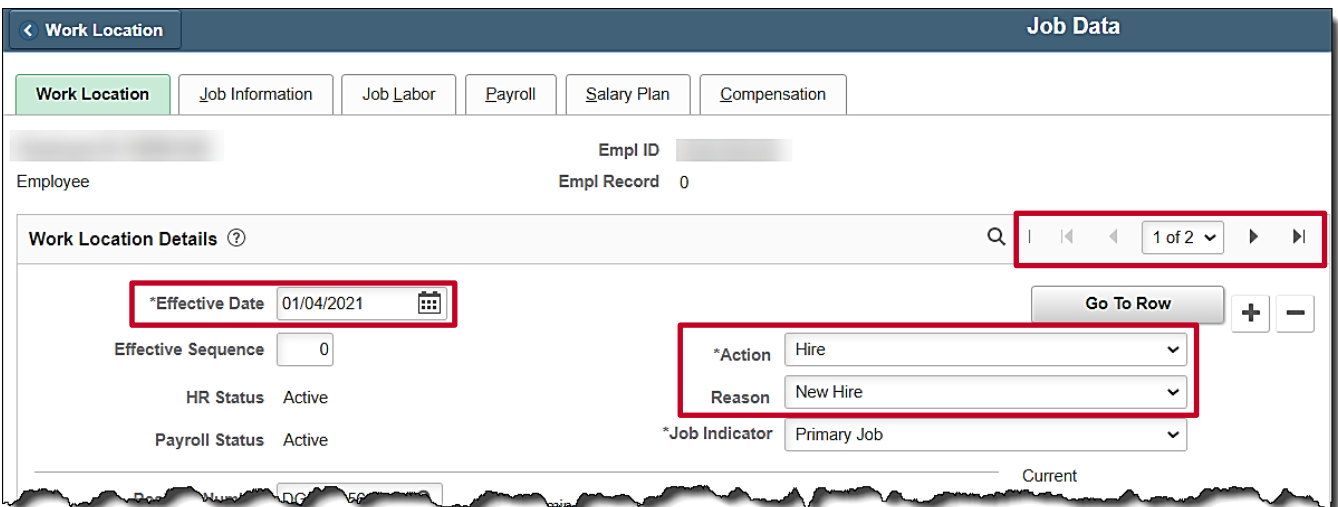
The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Job Data' page with the 'Work Location' tab selected. The page displays employee information (Employee ID, Empl ID, Empl Record) and a table of work location details. The 'Add a Row' icon (a plus sign) is highlighted with a red box.

- Click the **Add a Row** icon.

The page refreshes and is now editable as a new effective dated row.



The screenshot shows the 'Job Data' page with the 'Work Location' tab selected. The page displays employee information (Employee ID, Empl ID, Empl Record) and a table of work location details. The 'Effective Date' field is highlighted with a red box, and the 'Add a Row' icon is also highlighted with a red box.

- The **Effective Date** field defaults to the current system date. Update this date to the applicable date of transfer as needed using the **Calendar** icon.

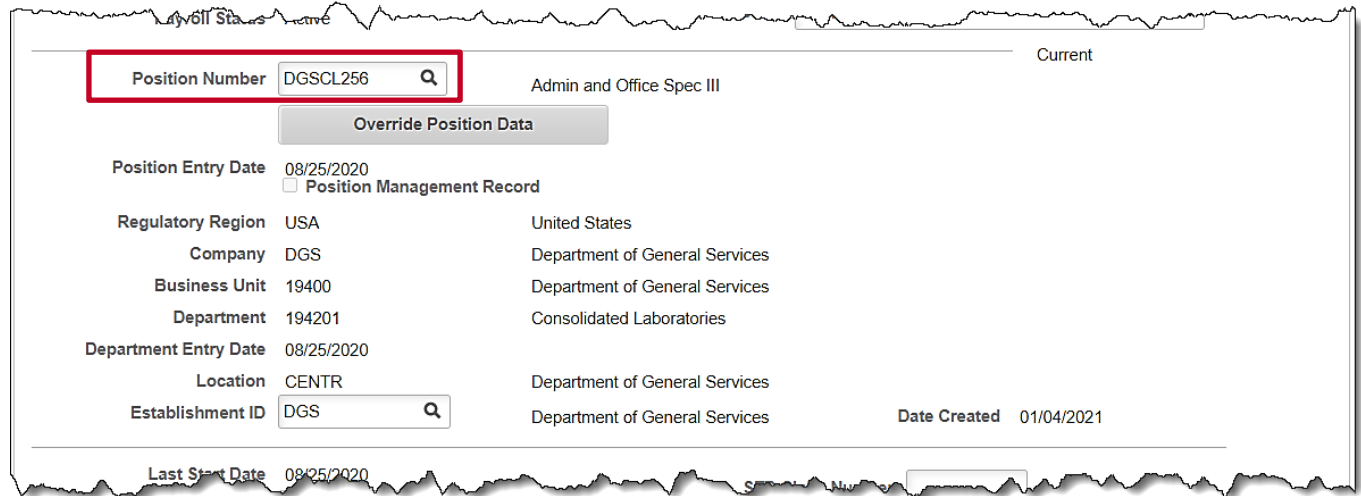
Note: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- The Action defaults from the previous row. Select the applicable action of **Transfer** using the **Action** field dropdown button.

7. Click the **Reason** field dropdown button and select the applicable “**Transfer In**” reason.

Note: The appropriate Action/Action Reason that best describes the hire/rehire reason is selected. The job aid entitled **HR351 Action Reason Codes** provides a list of valid action/action reason combinations. Additionally, for agencies previously using PMIS codes, a crosswalk is provided to help decide which Cardinal code to use. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

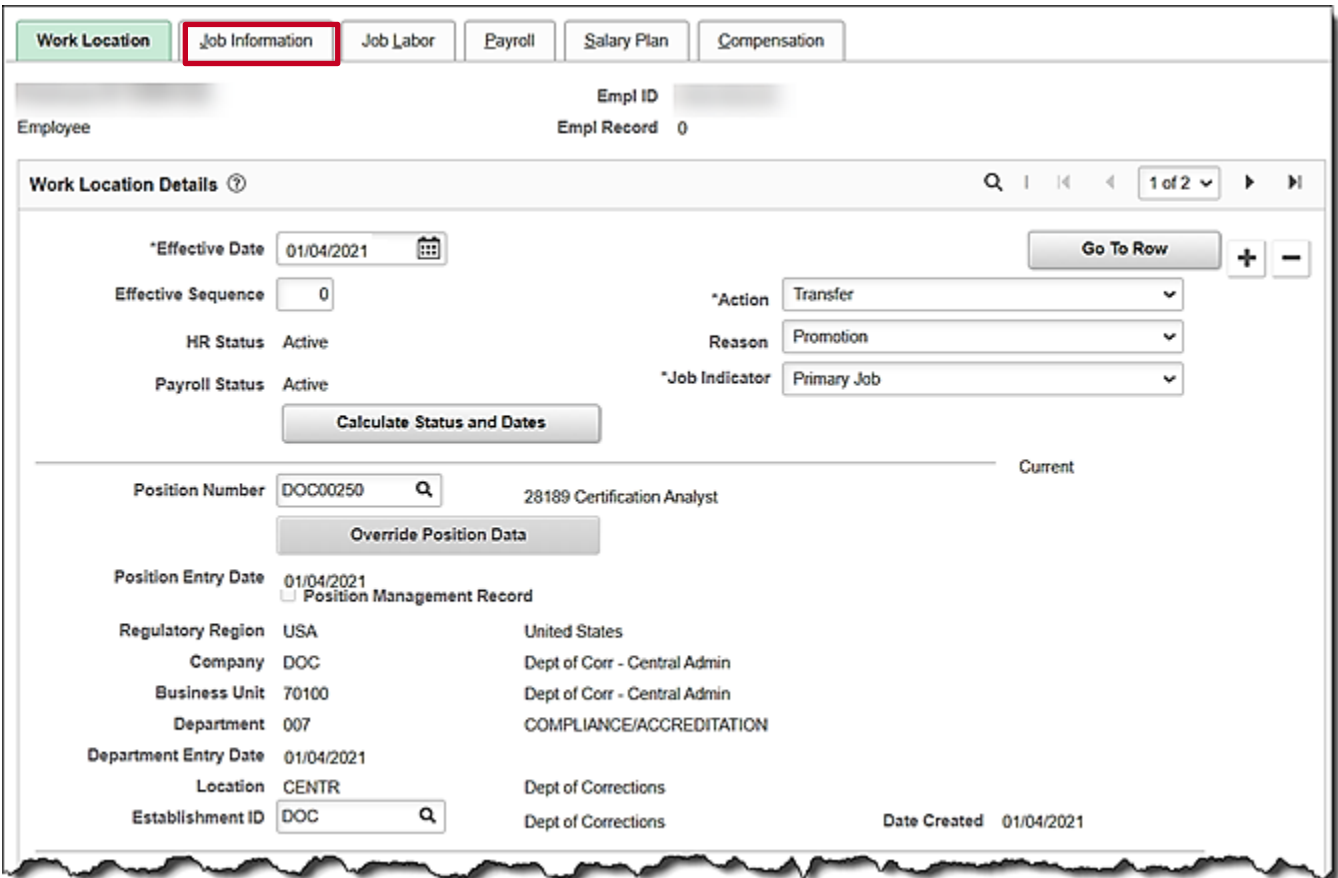
8. Scroll down as needed and click in the **Position Number** field.



The screenshot shows the Cardinal HR system interface. At the top, there is a header with "Civil Service" and "Current". Below this, the "Position Number" field is highlighted with a red box and contains the value "DGSCL256". To the right of this field is a "Look Up" icon (a magnifying glass). Below the "Position Number" field is a button labeled "Override Position Data". To the right of the "Position Number" field, the text "Admin and Office Spec III" is displayed. Below the "Override Position Data" button, there is a section for "Position Entry Date" with the value "08/25/2020" and a checkbox for "Position Management Record". Below this, there is a section for "Regulatory Region" with the value "USA" and "United States". Below this, there is a section for "Company" with the value "DGS" and "Department of General Services". Below this, there is a section for "Business Unit" with the value "19400" and "Department of General Services". Below this, there is a section for "Department" with the value "194201" and "Consolidated Laboratories". Below this, there is a section for "Department Entry Date" with the value "08/25/2020". Below this, there is a section for "Location" with the value "CENTR" and "Department of General Services". Below this, there is a section for "Establishment ID" with the value "DGS" and "Department of General Services". To the right of the "Establishment ID" field, the text "Date Created 01/04/2021" is displayed. At the bottom of the form, there is a section for "Last Start Date" with the value "08/25/2020".

9. Highlight the existing Position Number and enter/select the new Position Number in the **Position Number** field using the **Look Up** icon.
10. Tab out of the field.

The page refreshes with the new data based on the Position selected.



Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted]
Empl Record: 0

Work Location Details ? Q | < > 1 of 2 > >>

*Effective Date: 01/04/2021 Go To Row + -

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

*Action: Transfer

Reason: Promotion

*Job Indicator: Primary Job

Calculate Status and Dates

Position Number: DOC00250 28189 Certification Analyst

Override Position Data

Position Entry Date: 01/04/2021 Current

☒ Position Management Record

Regulatory Region: USA United States

Company: DOC Dept of Corr - Central Admin

Business Unit: 70100 Dept of Corr - Central Admin

Department: 007 COMPLIANCE/ACCREDITATION

Department Entry Date: 01/04/2021

Location: CENTR Dept of Corrections

Establishment ID: DOC Dept of Corrections

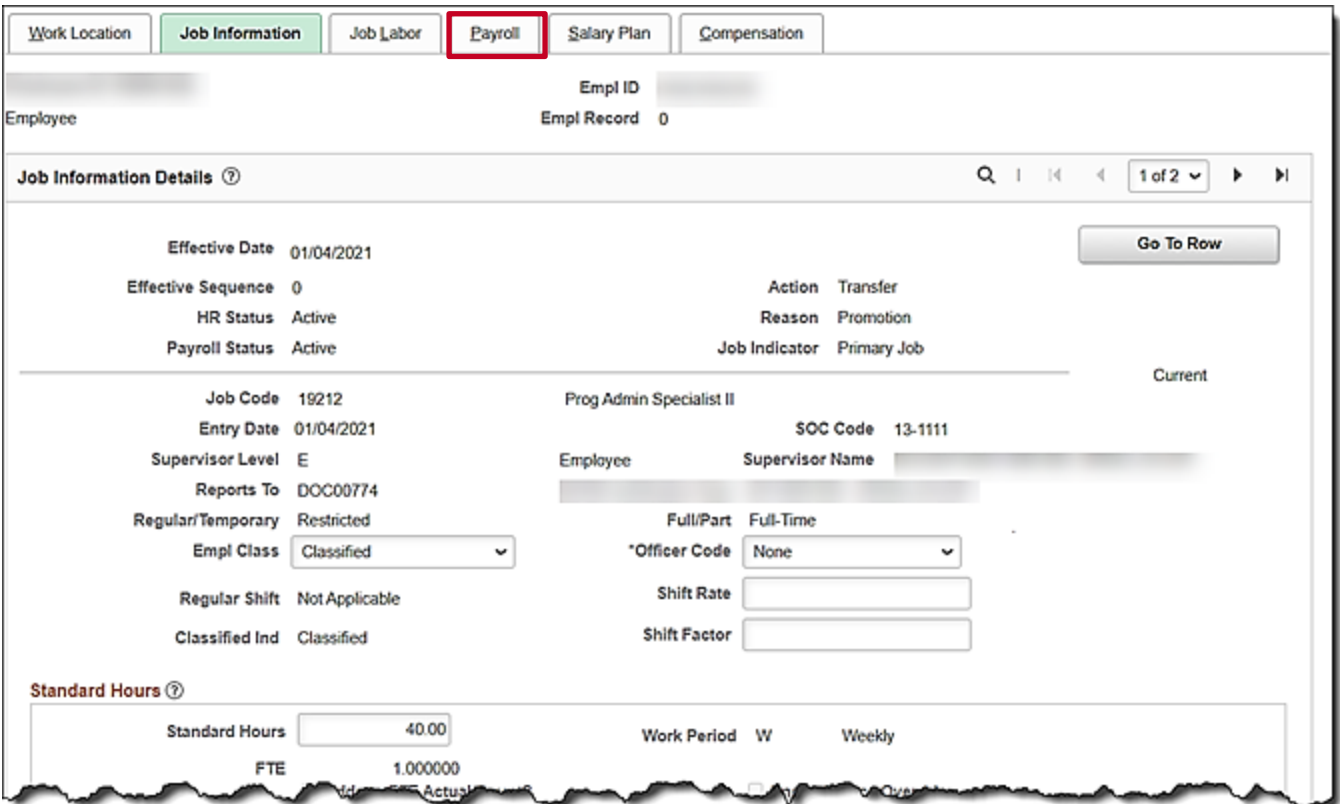
Date Created: 01/04/2021

11. The remaining information populates based on the Position Number entered/selected. Review the information. If the Position Data is not correct, cancel the action and make corrections to the Position before assigning the employee to the position.

Note: For further information on updating Position Data, see the Job Aid titled **HR351 Managing a Position**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

12. If the Position Data is correct, click the **Job Information** tab.

The **Job Information** tab displays.



Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 0

Job Information Details ⓘ

Effective Date: 01/04/2021 | Action: Transfer | Reason: Promotion | Job Indicator: Primary Job | Current

Effective Sequence: 0 | HR Status: Active | Payroll Status: Active

Job Code: 19212 | Prog Admin Specialist II | SOC Code: 13-1111

Entry Date: 01/04/2021 | Supervisor Level: E | Employee: [Redacted] | Supervisor Name: [Redacted]

Reports To: DOC00774 | Regular/Temporary: Restricted | Empl Class: Classified | Full/Part: Full-Time | *Officer Code: None

Regular Shift: Not Applicable | Shift Rate: [Redacted] | Shift Factor: [Redacted]

Classified Ind: Classified

Standard Hours ⓘ

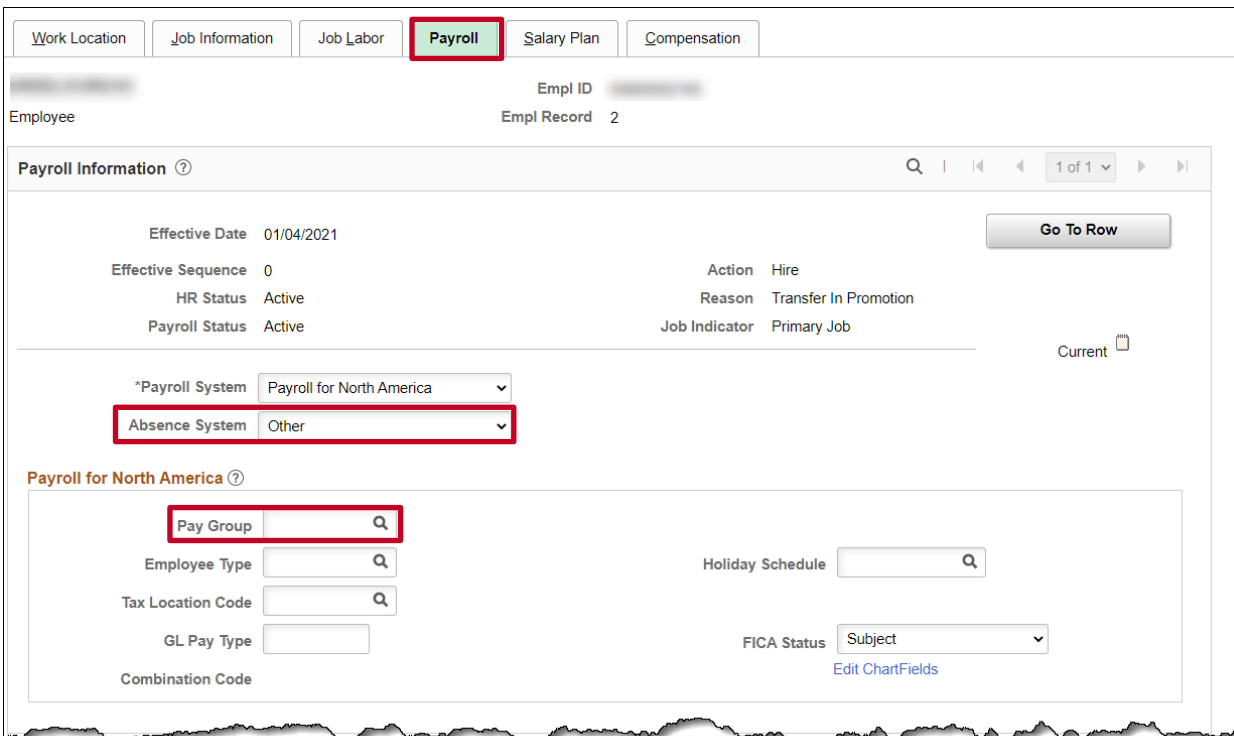
Standard Hours: 40.00 | Work Period: W Weekly | FTE: 1.000000

- Review the job information. If the job information is not correct, cancel the action and make corrections to the Position before assigning the employee to the position.

Note: For further information on updating Position Data, see the Job Aid titled **HR351 Managing a Position**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- If the job information is correct, click the **Payroll** tab.

The **Payroll** tab displays.



Work Location | Job Information | Job Labor | **Payroll** | Salary Plan | Compensation

Employee ID: [Redacted] Empl ID: [Redacted]
Employee: [Redacted] Empl Record: 2

Payroll Information ?

Effective Date: 01/04/2021
Effective Sequence: 0
HR Status: Active
Payroll Status: Active
Action: Hire
Reason: Transfer In Promotion
Job Indicator: Primary Job
Go To Row

*Payroll System: Payroll for North America
Absence System: Other

Payroll for North America ?

Pay Group: [Redacted]
Employee Type: [Redacted]
Tax Location Code: [Redacted]
GL Pay Type: [Redacted]
Combination Code: [Redacted]
Holiday Schedule: [Redacted]
FICA Status: Subject
[Edit ChartFields](#)

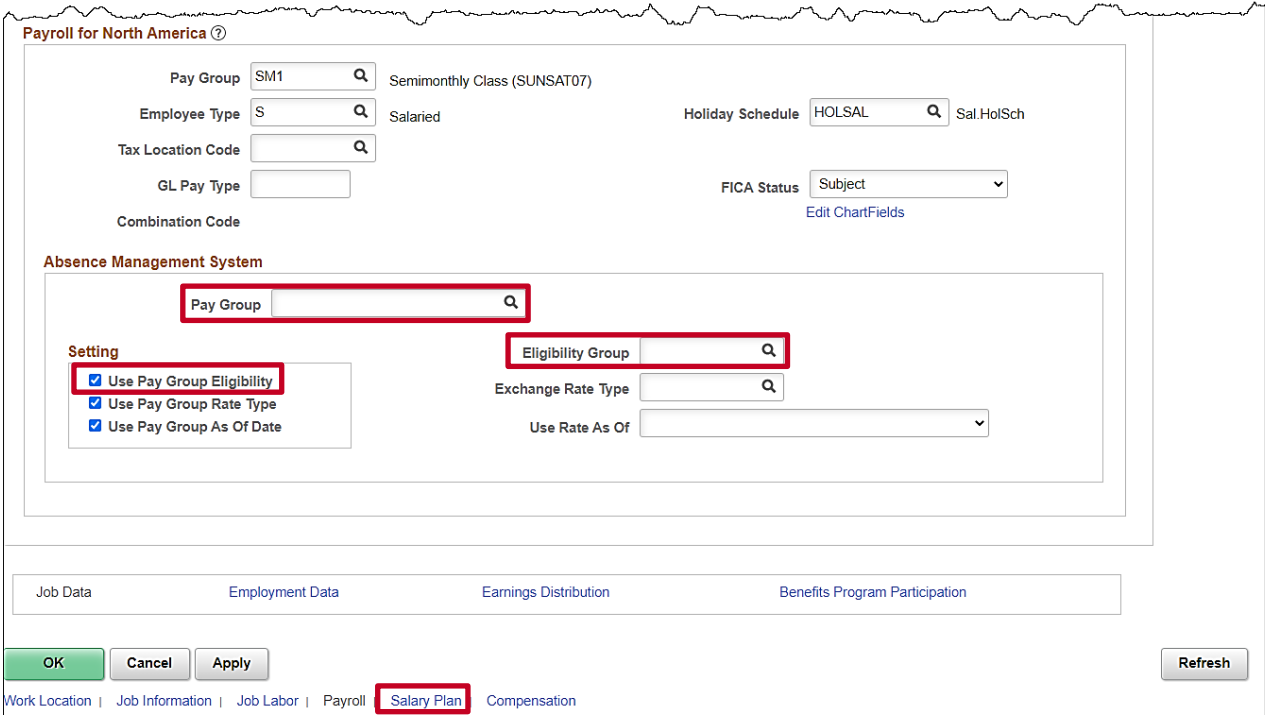
15. The **Absence System** field defaults to “Other”. If the agency uses Cardinal Absence Management, click the drop-down button and select “**Absence Management**”.

Note: The **Absence Management** section is visible only if “**Absence Management**” is selected in the **Absence System** field, otherwise this section is hidden.

16. Enter/select the applicable Pay Group in the **Pay Group** field within the **Payroll for North America** section.

Note: The options available within the **Pay Group** field are driven by the type of Absence System selected. It is, therefore, important to complete this page in order from top to bottom.

The page refreshes.



Payroll for North America ?

Pay Group Semimonthly Class (SUNSAT07)

Employee Type Salaried

Holiday Schedule Sal.HolSch

Tax Location Code

GL Pay Type

FICA Status [Edit ChartFields](#)

Combination Code

Absence Management System

Pay Group

Setting

☒ Use Pay Group Eligibility

☒ Use Pay Group Rate Type

☒ Use Pay Group As Of Date

Eligibility Group

Exchange Rate Type

Use Rate As Of

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

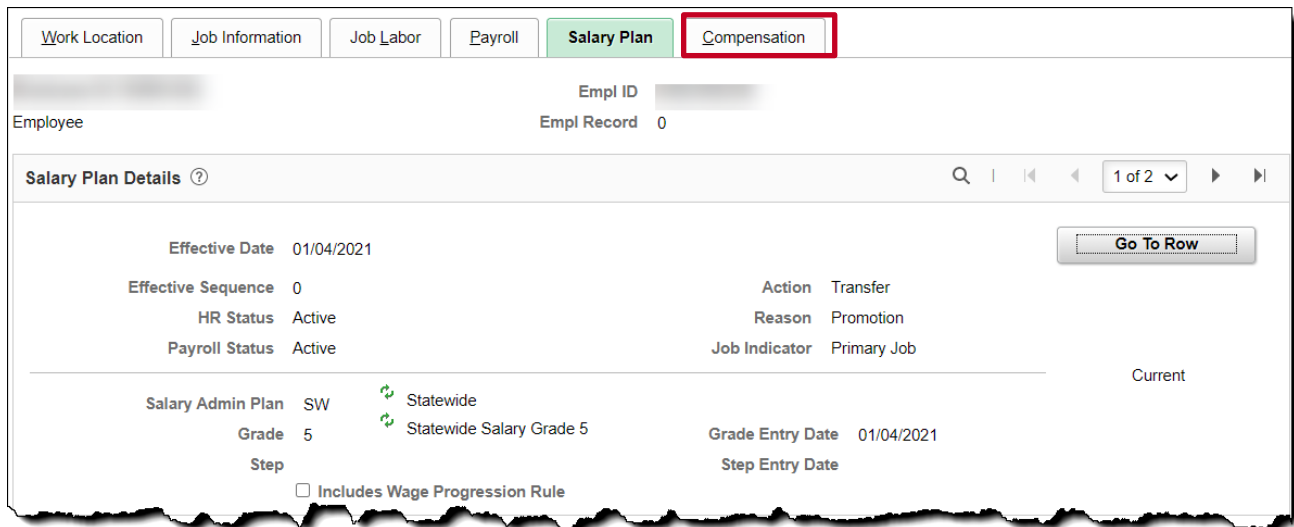
OK | Cancel | Apply | Refresh

[Work Location](#) | [Job Information](#) | [Job Labor](#) | Payroll | **[Salary Plan](#)** | [Compensation](#)

Note: The **Employee Type** and **Holiday Schedule** fields default based on the Pay Group selection. The **Absence Management System** section only displays if “**Absence Management**” is selected in the **Absence System** field.

17. Enter/select the applicable Tax Location Code (previously known as the FIPS code) in the **Tax Location Code** field.
18. Enter/select the same Pay Group in the **Pay Group** field within the **Absence Management System** section as was selected in the **Pay Group** field within the **Payroll for North America** section if the Pay Group is not auto-populated.
19. De-select the **Use Pay Group Eligibility** checkbox.
20. Enter/select the appropriate Eligibility Group in the **Eligibility Group** field.
21. Once the payroll information is entered, click the **Salary Plan** link at the bottom of the page.
22. If the payroll information is correct, click the **Salary Plan** tab.

The **Salary Plan** tab displays.

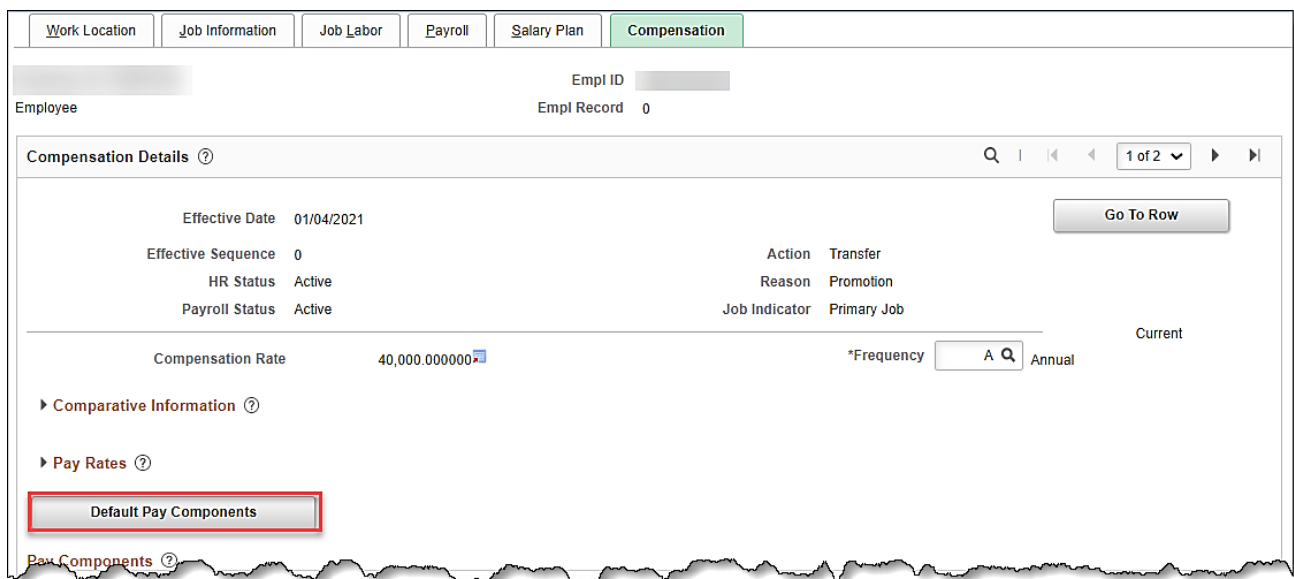


23. Review the salary plan information. If the salary plan information is not correct, cancel the action and make corrections to the Position before assigning the employee to the position. The Salary Admin Plan/Grade may change for the employee if this action is a promotion or demotion.

Note: For further information on updating Position Data, see the Job Aid titled **HR351 Managing a Position**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

24. If the salary plan information is correct, click the **Compensation** tab.

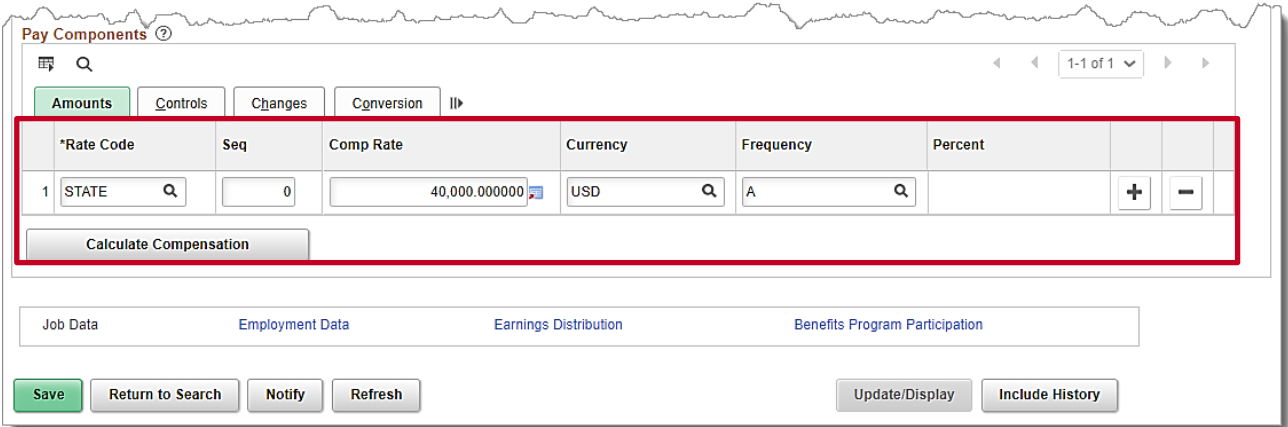
The **Compensation** tab displays.



25. Review and update the compensation information for the employee as needed. If no updates are needed, proceed to step 24.

26. Click the **Default Pay Components** button.
27. Scroll down on the page to the **Pay Components** section.

The remaining information displays.



Pay Components ⓘ

Amounts Controls Changes Conversion II▶

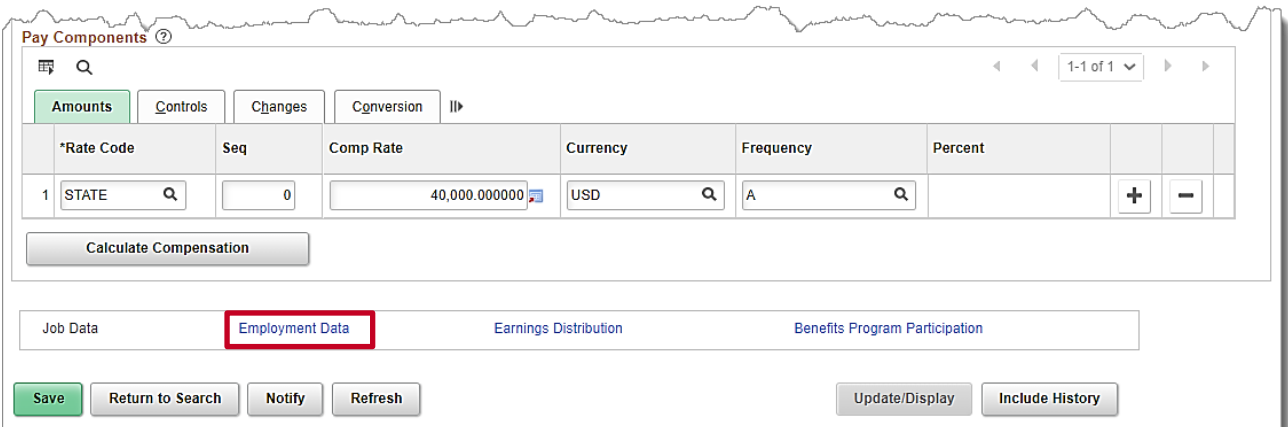
| *Rate Code | Seq | Comp Rate | Currency | Frequency | Percent | | |
|------------|-----|-----------------|----------|-----------|---------|---|---|
| 1 STATE 🔍 | 0 | 40,000.000000 📄 | USD 🔍 | A 🔍 | | + | - |

Calculate Compensation

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Refresh Update/Display Include History

28. Update the **Rate Code** field as needed using the **Look Up** icon.
29. Highlight the existing compensation rate and enter the new compensation rate in the **Comp Rate** field as needed.
30. Verify the **Frequency** field as needed using the **Look Up** icon.



Pay Components ⓘ

Amounts Controls Changes Conversion II▶

| *Rate Code | Seq | Comp Rate | Currency | Frequency | Percent | | |
|------------|-----|-----------------|----------|-----------|---------|---|---|
| 1 STATE 🔍 | 0 | 40,000.000000 📄 | USD 🔍 | A 🔍 | | + | - |

Calculate Compensation

Job Data **Employment Data** Earnings Distribution Benefits Program Participation

Save Return to Search Notify Refresh Update/Display Include History

31. Click the **Employment Data** link at the bottom of the page.

The **Employment Information** page displays.

Employment Information

Employee

Empl ID

Empl Record 0

Organizational Instance ?

Organizational Instance Rcd 0

Original Start Date 08/25/2020

Override

Last Start Date 08/25/2020

First Start Date 08/25/2020

Termination Date

Org Instance Service Date 08/25/2020

Override

Years 0

Months 4

Days 14

Organizational Assignment Data ?

Instance Record

Last Assignment Start Date 08/25/2020

First Assignment Start 08/25/2020

Assignment End Date

Home/Host Classification Home

Company Seniority Date 08/25/2020

Benefits Service Date 08/25/2020

Seniority Pay Calc Date 08/25/2020

Probation Date

Professional Experience Date

Business Title 28189 Certification Analyst

Position Phone

Years 0

Months 4

Days 14

Time Reporter Data

Work Mode Mobile Worker

Tenure Status/Contract Type

Alternate Leave Plan

Alternate Work Schedule

VSDP Effective Date 06/01/2001

Agency Use Field 1

Agency Use Field 2

Agency Use Field 3

Person Employment Dates ?

Continuous State Service Date 06/10/2001

Leave Eligibility Service Date 06/10/2001

Previous Months Of Service

USA

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

32. Review the employment information and validate for accuracy.

33. Click the Benefits Program Participation link.

The Benefits Program Participation page displays.

Benefit Program Participation

Employee

Empl ID

Empl Record 0

Benefit Status ?

Benefit Record Number 0

Effective Date 01/04/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Transfer

Reason Promotion

Job Indicator Primary Job

*Benefits System Benefits Administration

Annual Benefits Base Rate

USD

Current Benefits Employee Status Active

ACA Eligibility Details

Go To Row

Benefits Administration Eligibility ?

BAS Group ID

Elig Fld 1 JNN0000

Elig Fld 2

Elig Fld 3 Y

Elig Fld 4

Elig Fld 5

Elig Fld 6 11194

Elig Fld 7

Elig Fld 8 12-24

Elig Fld 9 SF-GB

Benefit Program Participation Details ?

*Effective Date 11/10/2019

Currency Code USD

*Benefit Program SAL

Salaried Employee Benefit Pgm

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Update/Display

Include History

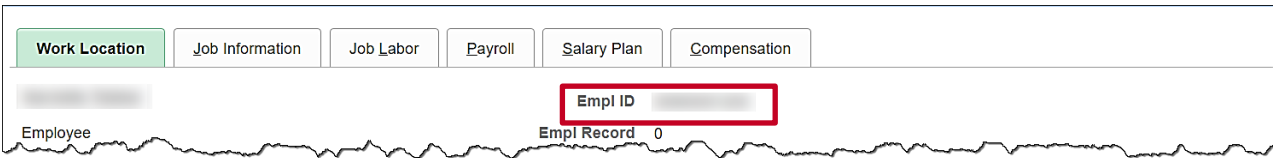
Correct History

34. Review the Benefits Program Participation information and validate for accuracy.

Note: If any of the Benefits Program Participation information is not correct, coordinate with a Benefits Administrator. For further information on eligibility configuration valid values, see the Job Aid titled **BN361 Overview of the Eligibility of Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

35. Click the **Save** button.

The **Work Location** tab returns.



The screenshot shows a web interface with a top navigation bar containing tabs: Work Location (highlighted in green), Job Information, Job Labor, Payroll, Salary Plan, and Compensation. Below the tabs, there is a form area. On the left, there is a label 'Employee' next to a blurred input field. On the right, there is a label 'Empl ID' next to a blurred input field, which is highlighted with a red rectangular box. Below the 'Empl ID' field, the text 'Empl Record 0' is visible.

36. Highlight the Employee ID and right click the mouse to copy the employee ID.
37. To run the HR Activity Report for the employee, use the following navigation:
Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report
38. Run the HR Activity Report for the employee.
Note: For further information on Reports, see the **HCM Reports Catalog**. The HCM Reports Catalog can be found on the Cardinal website under **Resources**.
39. Print the report and place the printed transaction in the employee file for future audit requests.

Transfer Employee from a Wage Position to a Salary Position or a Salary Position to a Wage Position

Before beginning, ensure that all necessary data is accessible and ready for data entry.

1. **Navigate** to the **Job Data** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID

begins with ▼

Empl Record

= ▼

Name

begins with ▼

Last Name

begins with ▼

Second Last Name

begins with ▼

Alternate Character Name

begins with ▼

Middle Name

begins with ▼

☐ Include History

☐ Correct History

☐ Case Sensitive


Limit the number of results to (up to 300):

300

Search

Clear

Basic Search

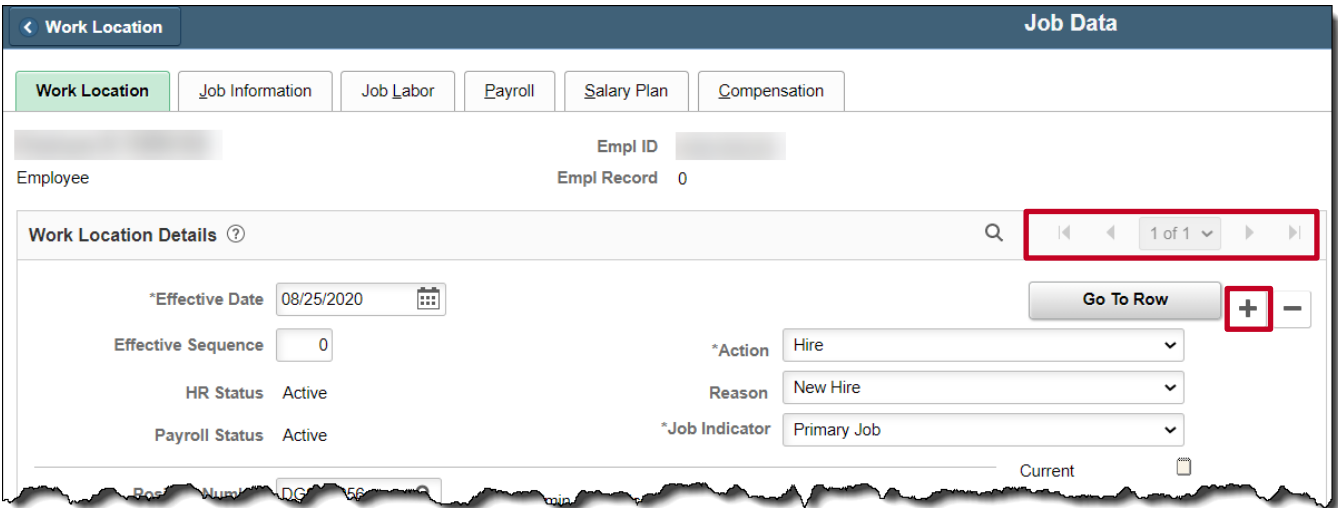
 Save Search Criteria

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

- Click the **Search** button.

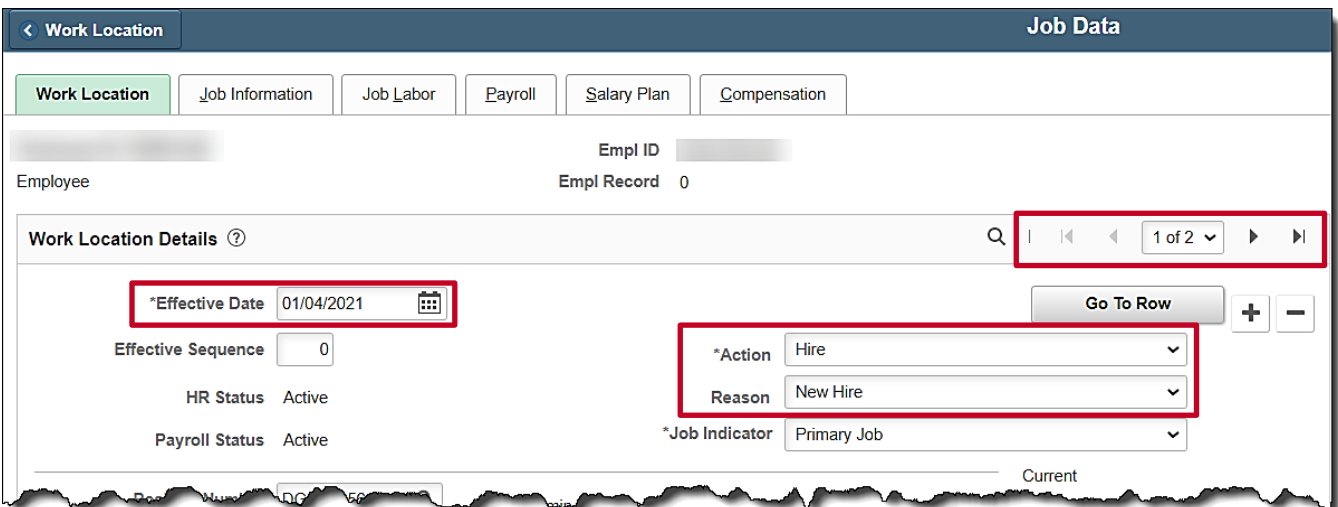
The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Job Data' page for an employee. The 'Work Location' tab is active. The 'Effective Date' is 08/25/2020. The 'Action' is 'Hire', 'Reason' is 'New Hire', and 'Job Indicator' is 'Primary Job'. The 'Add a Row' icon (+) is highlighted with a red box.

- Click the **Add a Row** icon.

The page refreshes and is now editable as a new effective dated row.



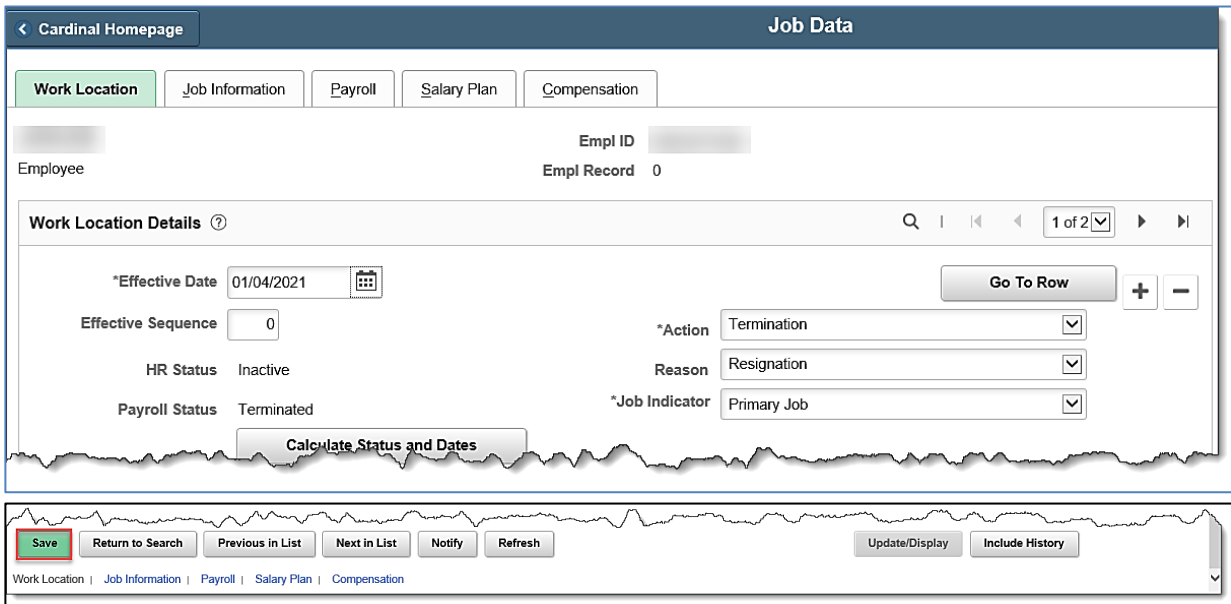
The screenshot shows the 'Job Data' page for an employee. The 'Work Location' tab is active. The 'Effective Date' is 01/04/2021. The 'Action' is 'Hire', 'Reason' is 'New Hire', and 'Job Indicator' is 'Primary Job'. The 'Add a Row' icon (+) is highlighted with a red box.

- The **Effective Date** field defaults to the current system date. Update this date to the applicable date of transfer as needed using the **Calendar** icon.

Note: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

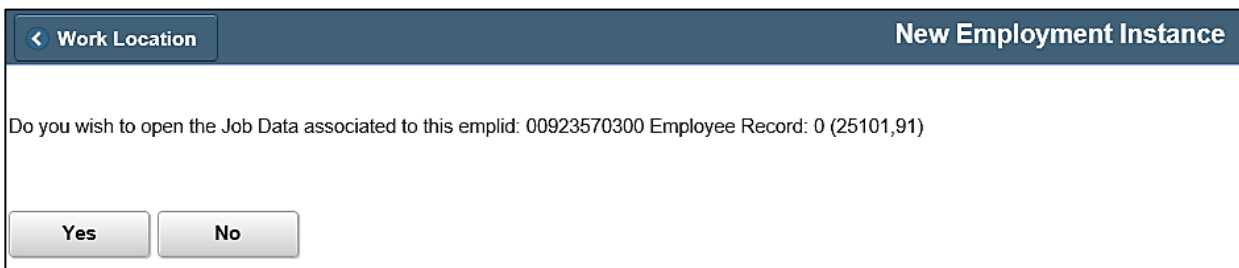
- The Action defaults from the previous row. Select the applicable action of "**Termination**" using the **Action** field dropdown button.

- Click the **Reason** field dropdown button and select “**Resignation**” as the termination reason.



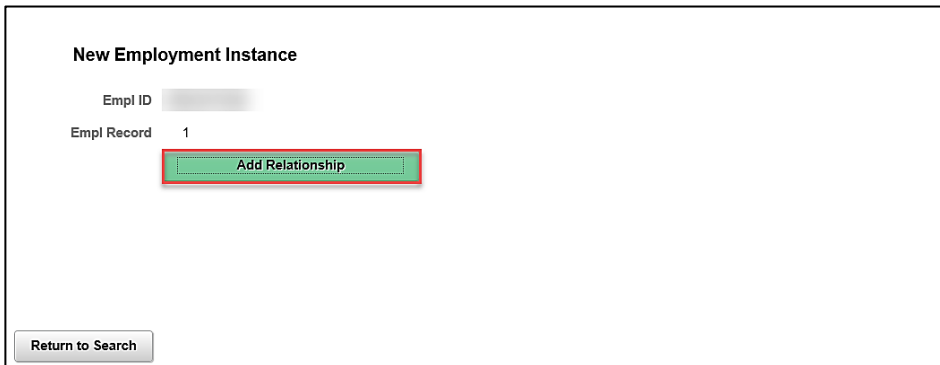
- Click the **Save** action.
- Navigate** to the **Job Data** page using the following path:
Navigator > Workforce Administration > Personal Information > Organizational Relationship > New Employee Instance

A message displays.



- Select **No** to add a new Job Record with a new Employee Record.

The **New Employment Instance** page is displayed.



New Employment Instance

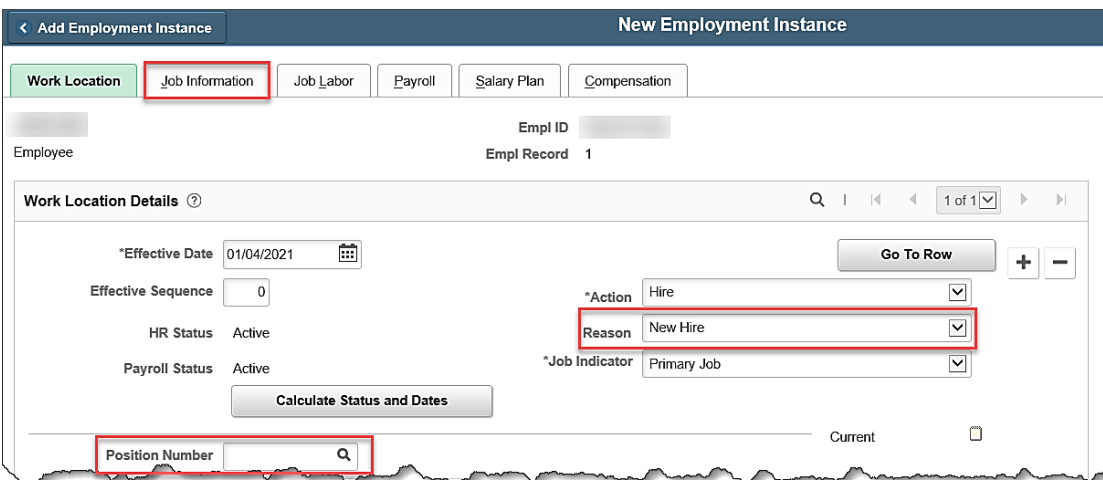
Empl ID

Empl Record 1

Add Relationship

Return to Search

10. Click on the **Add Relationship** radio button.



Add Employment Instance **New Employment Instance**

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Employee Empl ID Empl Record 1

Work Location Details 1 of 1

*Effective Date 01/04/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

*Action Hire

Reason New Hire

*Job Indicator Primary Job

Calculate Status and Dates

Position Number

Current

Note: In the example above the Empl Record is displayed as 1, the effective date has been updated to 01/04/2021, the action defaulted to hire.

11. Select **New Hire** as the reason.
12. Place the cursor in the **Position Number** field and enter/select the new Position Number using the **Look Up** icon.
13. Tab out of the field.
14. Click the **Job Information** tab.



Human Resources Job Aid

HR351 Managing the Intra-Agency Transfer Process

The **Job Information** tab displays.

Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Empl ID [Redacted]
Employee [Redacted] Empl Record 1

Job Information Details ?

Effective Date 01/04/2021
Effective Sequence 0
HR Status Active
Payroll Status Active

Action Hire
Reason New Hire
Job Indicator Primary Job

Go To Row

Job Code W19096
Entry Date 01/04/2021
Supervisor Level E

Human Resource Manager III
SOC Code 11-3049
Employee ERT01090 00353497200 JOHN DOE
Reports To ERT01090 27352 EEO Manager 00353497200 JOHN DOE

Regular/Temporary Regular
Empl Class [Redacted]
Full/Part Full-Time
*Officer Code None

Current

15. Click in the **Empl Class** field and select the applicable employee class for the position.
16. If the job information is correct, click the **Payroll** tab.

The **Payroll** tab displays.

< Add Employment Instance | **New Employment Instance**

Work Location | Job Information | Job Labor | **Payroll** | Salary Plan | Compensation

Empl ID [Redacted]
Employee [Redacted] Empl Record 1

Payroll Information ?

Effective Date 01/04/2021
Effective Sequence 0
HR Status Active
Payroll Status Active

Action Hire
Reason New Hire
Job Indicator Primary Job

Go To Row

*Payroll System Payroll for North America
Absence System Other

Payroll for North America ?

Pay Group [Redacted]
Employee Type [Redacted]
Tax Location Code [Redacted]
GL Pay Type [Redacted]

Holiday Schedule HOLHR
FICA Status Subject

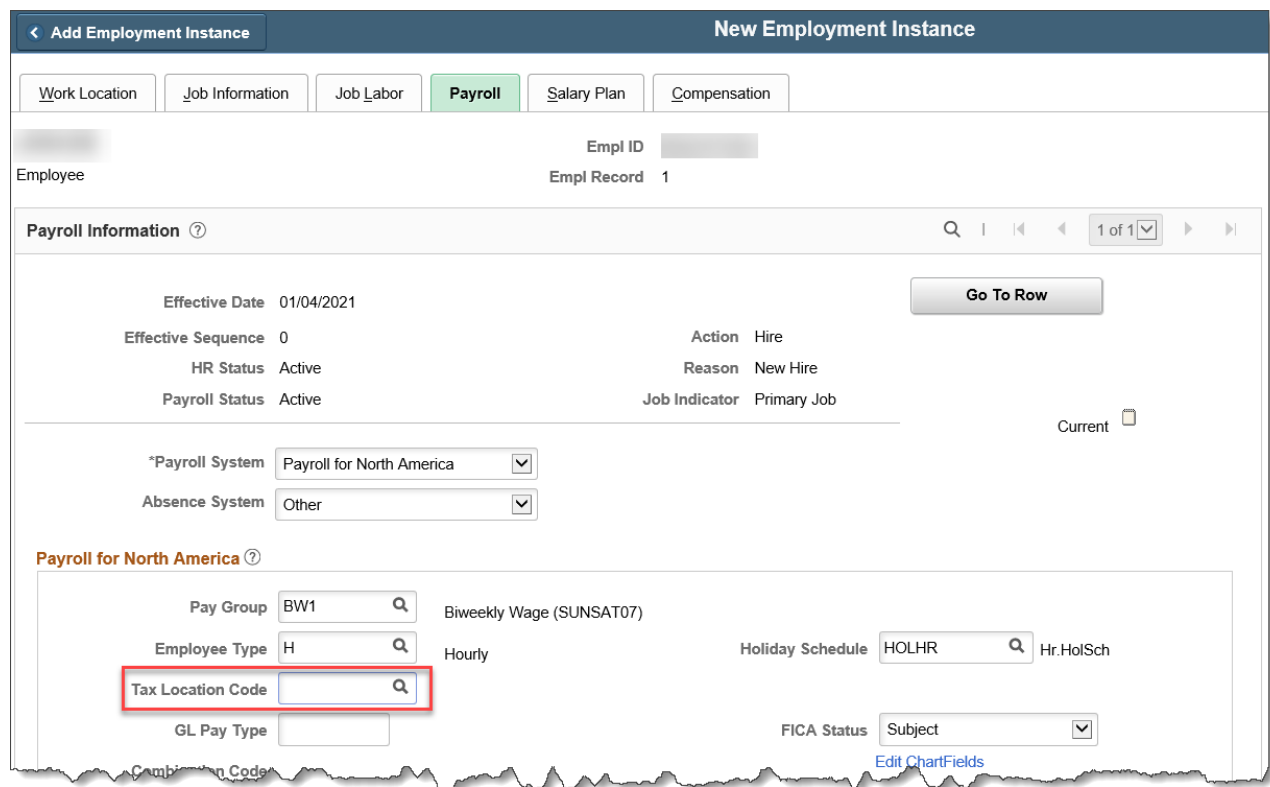
Current

17. The **Payroll System** field defaults to “Payroll for North America”. Do not change.

18. The **Absence System** field defaults to “Other”. If the new employee’s Agency uses the Cardinal Absence System, select “Absence Management” from the corresponding dropdown list. If the new employee’s Agency uses any absence management system besides the Cardinal Absence System, verify “Other” is selected in the **Absence System** field.
19. Select the applicable Pay Group using the **Pay Group Look Up** icon within the **Payroll for North America** section.

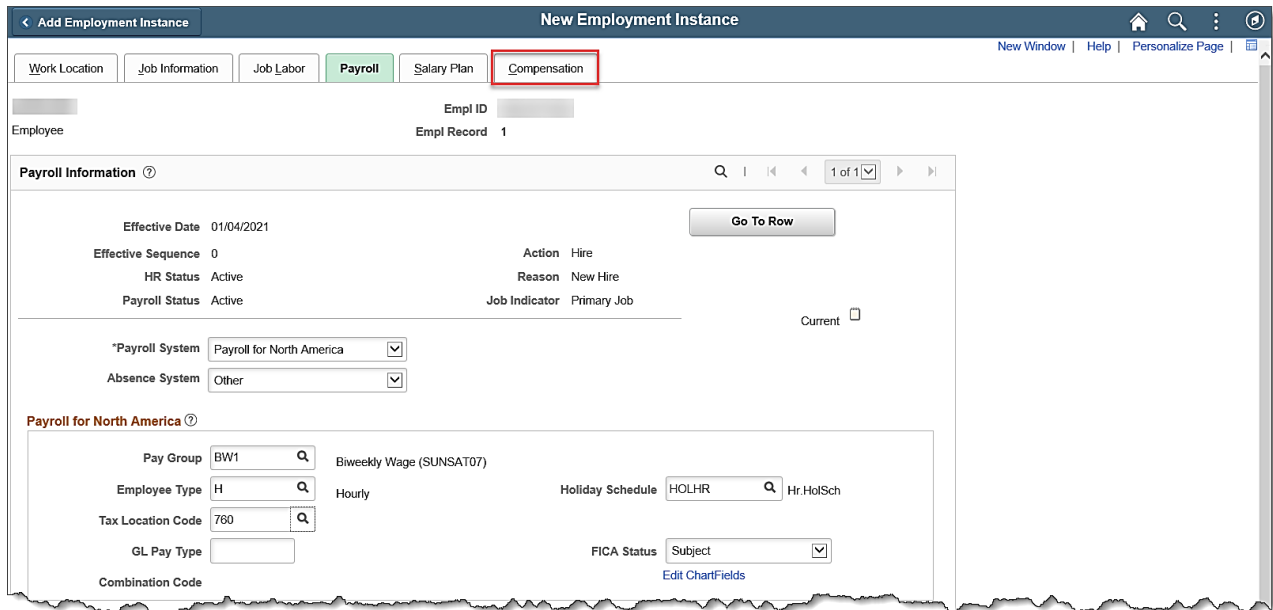
Note: FICA Status defaults to Subject, if the agency is using Cardinal Absence Management this value will remain as defaulted in.

The page refreshes once the **Pay Group** is selected.

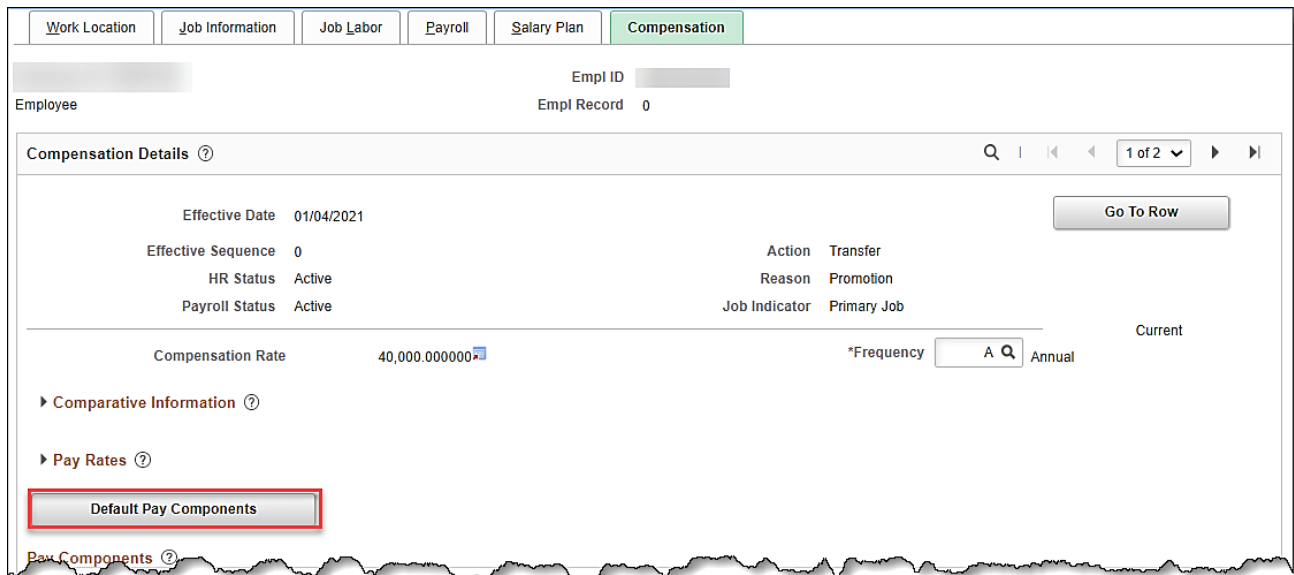


20. Select the applicable Tax Location Code using the **Tax Location Look Up** icon within the **Payroll for North America** section.

The page refreshes once the **Pay Group** is selected.

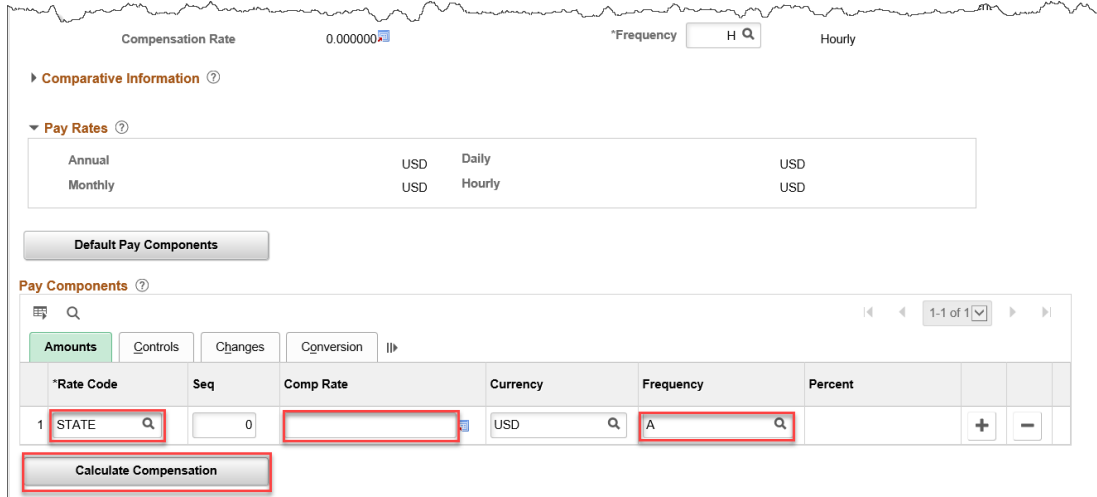


The **Compensation** tab displays.



21. Change the **Frequency** as applicable.
22. Click the **Default Pay Components** button.
23. Scroll down on the page to the **Pay Components** section.

The remaining information displays.



Compensation Rate 0.000000 *Frequency H Hourly

Comparative Information

Pay Rates

| | | | |
|---------|-----|--------|-----|
| Annual | USD | Daily | USD |
| Monthly | USD | Hourly | USD |

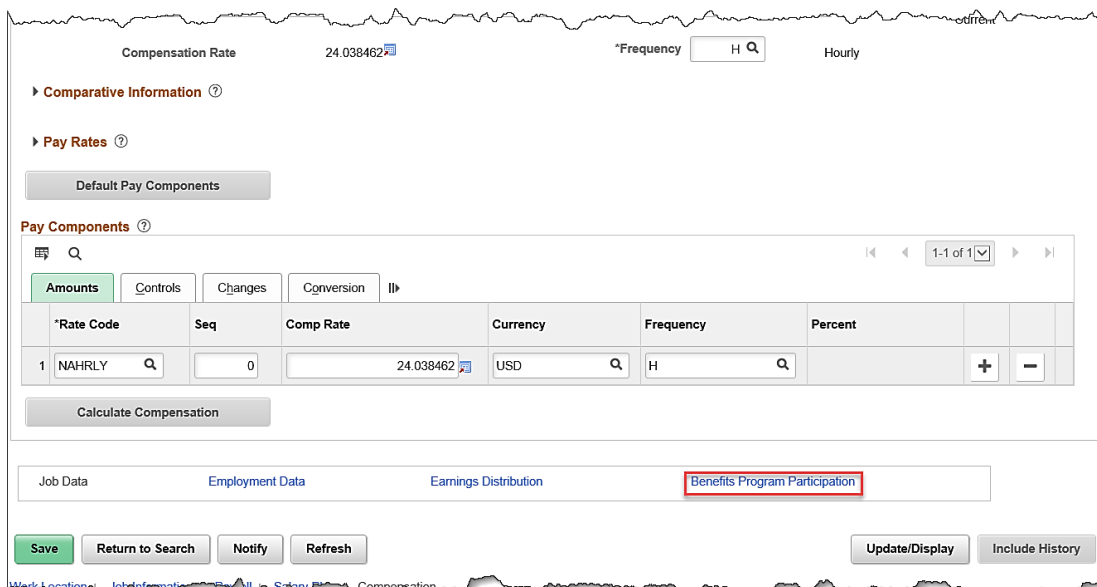
Default Pay Components

Pay Components

| *Rate Code | Seq | Comp Rate | Currency | Frequency | Percent |
|------------|-----|-----------|----------|-----------|---------|
| 1 STATE | 0 | | USD | A | |

Calculate Compensation

24. Update the **Rate Code** field as needed using the **Look Up** icon.
25. Highlight the existing compensation rate and enter the new compensation rate in the **Comp Rate** field as needed.
26. The **Frequency** field will default to the applicable value.



Compensation Rate 24.038462 *Frequency H Hourly

Comparative Information

Pay Rates

Default Pay Components

Pay Components

| *Rate Code | Seq | Comp Rate | Currency | Frequency | Percent |
|------------|-----|-----------|----------|-----------|---------|
| 1 NAHRLY | 0 | 24.038462 | USD | H | |

Calculate Compensation

Job Data Employment Data Earnings Distribution **Benefits Program Participation**

Save Return to Search Notify Refresh Update/Display Include History

27. Click the **Benefits Program Participation** link at the bottom of the screen.

The **Benefits Program Participation** page displays.

Add Employment Instance
New Employment Instance

Benefit Program Participation

Employee

Empl ID

Empl Record 1

Benefit Status ?

Benefit Record Number 0

Effective Date 01/04/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

*Benefits System Benefits Administration

Current

Benefits Employee Status Active

Annual Benefits Base Rate

USD

ACA Eligibility Details

Go To Row

Benefits Administration Eligibility ?

BAS Group ID

Elig Fld 1

Elig Fld 2

Elig Fld 3

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

Benefit Program Participation Details ?

*Effective Date 11/15/2020

Currency Code USD

*Benefit Program PSX

Sys delivered empty Ben Pgm

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

OK

Cancel

Apply

28. The **Elig Fld 1** field is updated when the VRS VNAV Upload runs on a monthly basis after the employee selects benefits. The field is updated manually **ONLY** when the upload creates an error for the employee. No data entry is required unless correcting the error.
29. Click the **Elig Fld 2 Look Up** icon and select the applicable Healthcare Group ID (Department value). These values are provided to the health benefit vendors and reflect the group in which the employee is enrolled (DHRM provided 9-digit number).

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30. Click the **Elig Fld 3 Look Up** icon and make the applicable selection based on who will be entering time for the employee.
31. The **Elig Fld 6** (free form text) field is updated when the VRS VNAV Upload runs on a monthly basis after the employee selects benefits. The field is updated manually **ONLY** when the upload creates an error for the employee. No data entry is required unless correcting the error.
32. Click the **Elig Fld 8 Look Up** icon and select the applicable pay sheet value. (i. e., 12 - 24)
33. Click the **Elig Fld 9 Look Up** icon. These values represent the nature of the employee and how the employee health premiums are paid. Select the breakdown of how the benefits payment will be split between the employee (EE) and the employer (ER).

Note: For further information on eligibility configuration valid values, refer to the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

34. Scroll down as needed and review the **Benefits Program Participation Details** section and validate for accuracy.

Note: Before clicking the **OK** button, review all Job Information. Once the **OK** button is clicked, the record is saved and anything entered incorrectly will require a help desk ticket for correction.

35. Click the **OK** button.
36. To run the **Employee Activity Report** for the employee, use the following navigation:
Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report
37. Run the **Employee Extract Report** for the selected employee.

Note: For additional information on the Employee Activity Report, see the **HCM Reports Catalog**. The HCM Reports Catalog can be found on the Cardinal website under **Resources**.

38. Print the report and place the printed transaction in the employee file for future audit requests.